Marketing & Outreach – Develop Implementation Plans

Description

A comprehensive marketing and outreach plan outlines: your target audiences; marketing and outreach goals and objectives; messages;and strategies to deliver the right information to your key audiences.

As you develop a marketing and outreach plan, be sure to coordinate among all program staff to ensure that the activities in other program areas, such as workforce development, financing, and data collection and evaluation, will be featured in or aligned with your marketing and outreach activities. For example, if your program will offer customers low-interest loans, you will want to promote these loan offerings in marketing materials.

Engage your program's stakeholders early in the development of the marketing and outreach plan to create buy-in, leverage the resources of all involved, and identify roles and responsibilities for internal and external parties.

In this handbook, you will find resources to help guide development of your marketing and outreach plan through the following steps:

- Develop marketing and outreach strategies and tactics
- Define marketing and outreach staffing needs, roles, and responsibilities
- Create a marketing and outreach workplan
- Establish a marketing and outreach budget
- Communicate the plan to partners.

Over the course of implementing and evaluating the success of various campaigns, you should plan to update and adjust your marketing and outreach plan regularly. Communities and markets evolve over time, and the most successful programs assess their progress continuously to make mid-stream adjustments when needed.

Marketing & Outreach

Stages:

Overview
1. Assess the Market
2. Set Goals & Objectives
3. Identify Partners
4. Make Design Decisions
5. **Develop Implementation Plans**
6. Develop Evaluation Plans
7. Develop Resources
8. Deliver Program
9. Assess & Improve Processes
10. Communicate Impacts

Find related information across other program components:

- **Market Position & Business Model – Create a Business Plan**
  Create your organization's business plan, which describes how your operational and financial structure will support the delivery of energy efficiency services.

- **Program Design & Customer Experience – Develop Implementation Plans**
  Develop a detailed plan for launching and operating your program that integrates all program components into a process that is customer-friendly and efficient for contractors and other partners.

- **Financing – Develop Implementation Plans**
  Develop a plan to implement your financing activities, with defined roles for financial institution partners, contractors, customers, and your program.

- **Contractor Engagement & Workforce Development – Develop Implementation Plans**
  Develop contractor engagement, quality assurance, and workforce development plans that include strategies, workflow, timelines, and staff and partner roles and responsibilities.

Step-by-Step

The groundwork you have laid thus far by **assessing the market**, **setting goals and objectives**, **identifying partners**, and **making design decisions** will help create an effective plan to create demand for your program services.

A well-written plan can provide a road map for your marketing and outreach efforts and help coordinate those efforts with other program elements to ensure roll out of a cohesive program.

The following steps can help guide development of your program's marketing and outreach plan:

Develop marketing and outreach strategies and tactics

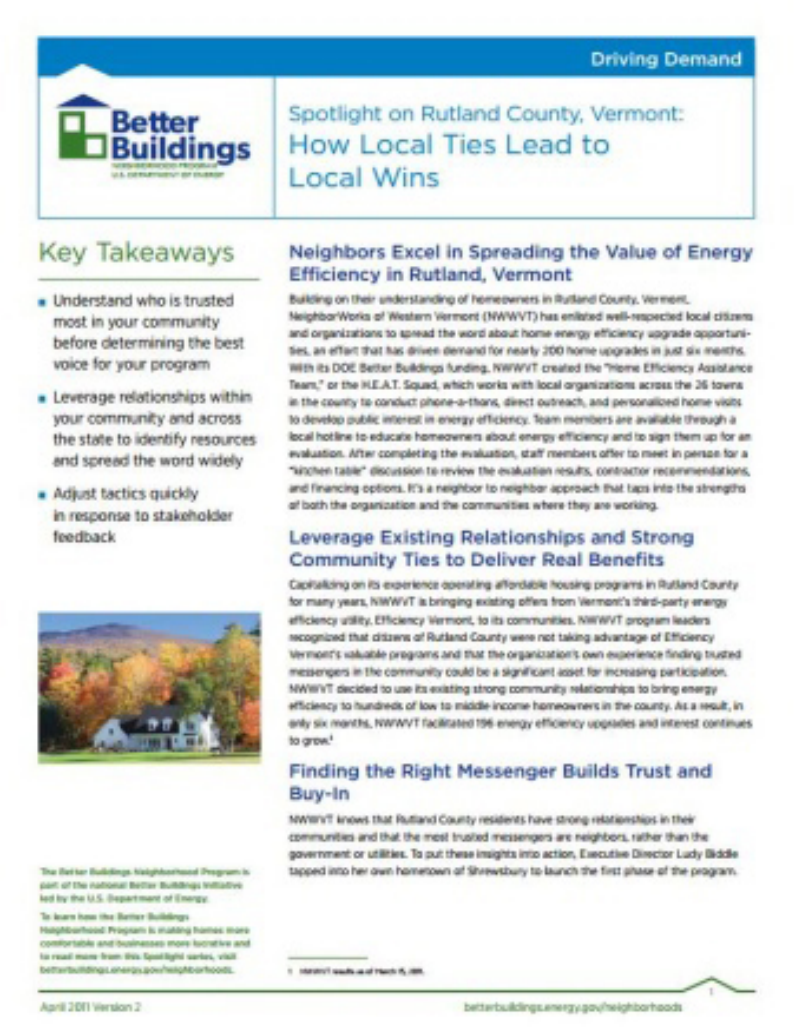
Strategies are broad approaches for communicating about the program to your audiences. Tactics are specific approaches used to implement each strategy. This step will help you consider the appropriate number of strategies and tactics to undertake for the program and help you decide which strategies and tactics might work best by providing examples of those that have proven successful for other residential energy efficiency programs.

You will want to carefully consider how many strategies and tactics to include in your marketing and outreach plan. A good rule of thumb is that you need to touch, or reach, a customer with your message at least three times before it sinks in. To touch a potential customer, you might decide to use three different tactics or the same tactic at least three different times. Layering traditional (e.g., advertising) and non-traditional (e.g., social media) strategies to deliver multiple customer touches in a complementary way can be effective in building program awareness and motivating residents to invest in home energy upgrades.

When developing your outreach strategies, keep in mind that many successful residential energy efficiency programs have found that person-to-person interaction is one of the most effective ways to influence consumers to undertake a home energy upgrade. You can reach your **priority audience** using influential, known, and **credible partners** who can leverage their relationships, members, and networks to deliver marketing messages.

Rutland County, Vermont Uses Trusted Messengers to Deliver Message

In Rutland County, Vermont, program organizers called upon trusted, credible organizations to encourage their neighbors to undertake energy evaluations and upgrades. In just one night, a local conservation group contacted nearly 200 county residents by phone and got 35% of them to undertake home energy assessments. More than 50% of those households that completed home energy assessments went on to complete home energy upgrades.



Driving Demand

Better Buildings

Spotlight on Rutland County, Vermont:
How Local Ties Lead to Local Wins

Key Takeaways

- Understand who is trusted most in your community before determining the best voice for your program
- Leverage relationships within your community and across the state to identify resources and spread the word widely
- Adjust tactics quickly in response to stakeholder feedback

Neighbors Excel in Spreading the Value of Energy Efficiency in Rutland, Vermont

Building on their understanding of homeowners in Rutland County, Vermont, NeighborWorks of Western Vermont (NWWVT) has enlisted well-respected local citizens and organizations to spread the word about home energy efficiency upgrade opportunities, an effort that has driven demand for nearly 200 home upgrades in just six months. With its DOE Better Buildings funding, NWWVT created the "Home Efficiency Assistance Team," or the H.E.A.T. Squad, which works with local organizations across the 26 towns in the county to conduct phone-a-thons, direct outreach, and personalized home visits to develop public interest in energy efficiency. Team members are available through a local hotline to educate homeowners about energy efficiency and to sign them up for an evaluation. After completing the evaluation, staff members offer to meet in person for a "kitchen table" discussion to review the evaluation results, contractor recommendations, and financing options. It's a neighbor to neighbor approach that taps into the strengths of both the organization and the communities where they are working.

Leverage Existing Relationships and Strong Community Ties to Deliver Real Benefits

Capitalizing on its experience operating affordable housing programs in Rutland County for many years, NWWVT is bringing existing offers from Vermont's third-party energy efficiency utility, Efficiency Vermont, to its communities. NWWVT program leaders recognized that citizens of Rutland County were not taking advantage of Efficiency Vermont's valuable programs and that the organization's own experience finding trusted messengers in the community could be a significant asset for increasing participation. NWWVT decided to use its existing strong community relationships to bring energy efficiency to hundreds of low to middle income homeowners in the county. As a result, in only six months, NWWVT facilitated 196 energy efficiency upgrades and interest continues to grow.[1]

Finding the Right Messenger Builds Trust and Buy-In

NWWVT knows that Rutland County residents have strong relationships in their communities and that the most trusted messengers are neighbors, rather than the government or utilities. To put these insights into action, Executive Director Lady Biddle tapped into her own hometown of Shrewsbury to launch the first phase of the program.

The Better Buildings Neighborhood Program is part of the national Better Buildings Initiative led by the U.S. Department of Energy.

To learn how the Better Buildings Neighborhood Program is making homes more comfortable and businesses more lucrative and to read more from this Spotlight series, visit betterbuildings.energy.gov/neighborhoods.

1 NWWVT results as of March 15, 2011.

April 2011 Version 2

betterbuildings.energy.gov/neighborhoods

Source: **Spotlight on Rutland County, Vermont: How Local Ties Lead to Local Wins**, U.S. Department of Energy, 2011.

You will also want to consider cost—including staff and volunteer time—when selecting program strategies including direct and indirect staff time, incentives, and materials. Compare the strategy cost to the number of homes upgraded as a result of this strategy to determine your program's return on investment. Is this strategy more expensive than other available strategies that achieve similar results? If so, you might want to reconsider your approach.

Learn more about developing effective strategies and tactics in **Lawrence Berkeley National Laboratory's Driving Demand for Home Energy Improvements website**.

Examples of Strategies and Tactics

Narrow down the strategies and tactics that might best be suited to reach priority audiences and help create demand for home energy upgrades, based on your **market research** and the marketing and outreach **goals and objectives** you are trying to reach. Following are some example strategies and the tactics programs used to implement them:

- **Internet Presence**: Your website is often what makes a first impression on potential customers, so plan a site that reflects your brand and messaging and is easy to navigate. Making your site easy to find through frequently used search engines is an important strategy for promoting your program. To ensure that your site comes up in search engines, add metadata, or key words, that potential customers might use to find information on your site (e.g., home improvement, home energy efficiency, reducing drafts, comfortable home).
    - **Enhabit**, **Energy Impact Illinois**, and **Efficiency Maine** made their websites easy-to-find, one-stop-shops for energy assessments, upgrades, incentives, financing, and other program information.

- **Tours of upgraded homes**: Hosting tours allows messages to be delivered to potential customers by satisfied customers and encourages face-to-face contact between potential customers, the program, and contractors. These events allow potential customers to see completed home energy upgrades and speak directly to homeowners and contractors about the process and its results. Additionally, events provide valuable audience feedback concerning messaging and incentives. Events require staff time, so be sure to plan accordingly so as not to overextend program capacity.

- House parties are a tactic that **Energy Impact Illinois** used to build momentum for energy assessments and upgrades. The program leveraged the credibility of trusted neighbors to show guests where energy was being wasted and explain ways to improve comfort while saving energy. Program staff and contractors would be on hand to talk about the program and improvements. Learn more about the house parties by reading the U.S. Department of Energy Focus Series Interview, **Energy Impact Illinois Learns That Parties Sell Upgrades**.
  - **NOLA WISE** (New Orleans, Louisiana Worthwhile Investments Save Energy) found the most high-quality leads emerging through innovative homeowner showcase events, where an open house tour was given in the upgraded home of a happy NOLA WISE client. Signage was placed throughout the house, highlighting all the work that was completed and the associated energy savings. The contractor who completed the work was invited to attend to explain the upgrades and network with new leads. Data showed an increase in home energy assessment requests in neighborhoods where these events were held.
  - In Jacksonville, Florida, **ShopSmart with JEA** initiated a pilot program to foster awareness among neighborhood communities known as Home Energy Makeover: Block Party. Homeowners who contracted with a local energy professional to receive a home energy assessment offered to host block parties for their neighbors. The energy professionals attended the parties as well and reviewed the entire process of upgrading a homefrom receiving an initial assessment to installing upgrades and applying for rebatesand answered questions from family, friends, and neighbors in attendance.
  - The California Center for Sustainable Energy (CCSE)a sub-grantee of the Better Buildings Neighborhood Program partner in **Los Angeles County**and the City of Chula Vista, California, provided **demonstration home tours**. During the tours, neighbors heard testimonials from the homeowners and got a firsthand look at the improvements that were done and the contractors' handiwork. Participants were able to learn about their neighbors' experiences, ask questions of the contractors who installed the upgrades, and sign up for an energy assessment of their own home for less than $50. Contractors were very pleased with the business that was generated from the tours. This was one of the most cost effective tactics we've done, says Ken Justo of ASI Hastings Heating & Air.

California Puts Homes on Display

CCSE demonstration home tour participants learned about the home's completed upgrades by talking to contractors and reading signage.

Source: California Community Savings Initiative, 2012.

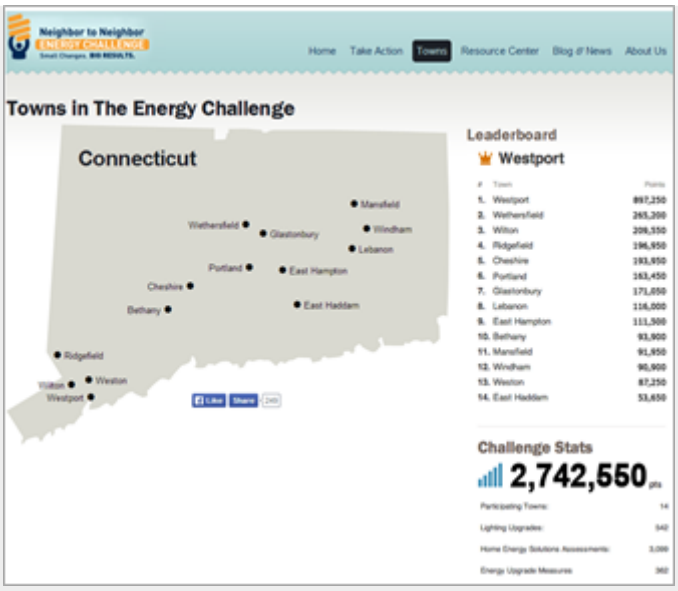
In Their Own Words: Engaging Neighbors Through Home Energy Showcases

Source: U.S. Department of Energy, 2012.

- **Neighborhood Sweep**s: Neighborhood sweeps are geographically targeted campaigns to reach a specific audience in an identified community within a defined period of time. Some residential energy efficiency programs have found success targeting neighborhoods; however, restricting outreach to a defined geographic area can unnecessarily limit program participation, so consider sweeps as part of a larger strategy.
    - **Michigan Saves**, formerly BetterBuildings for Michigan, conducted 58 neighborhood sweeps that reached more than 10,000 homeowners across the state. The sweeps allowed Michigan Saves to test different marketing approaches and messages with door-to-door canvassing and other outreach tactics in many different communities. While the sweeps helped the program get a strong start, the program learned that its original expectation to deeply penetrate small sections of neighborhoods (420 homes) in short bursts of 8 to 12 weeks was more effective when people were given more time (up to a year) for the concept to sink in before they were prepared to undertake home energy upgrades. The program also learned to use canvassing to advertise for program events instead of using that time to sell residents on upgrades. With a letter in the mail, they also let neighborhood residents know when a sweep was coming to them before sending program staff door-to-door. The program provided contact information in case residents wanted to opt in or out of these visits. Michigan Saves also learned that door-to-door canvassing conducted between 4:00 PM and 6:00 PM was most successful (i.e., after work, but before dinner or television time). Learn more about Michigan Saves' sweeps campaign in the case study, **Spotlight on BetterBuildings for Michigan: Sweeping the State for Ultimate Success**.
    - The **City of Indianapolis's Near Eastside Neighborhood Sweeps Program** had contractors conduct upgrades in a sweep fashion. Homeowners who participated in the sweeps program received a free home energy assessment, installation of some quick energy-saving measures, and up to $1,500 to complete energy efficiency upgrades recommended in the home energy assessment. The targeted nature of the sweeps maximized the cost effectiveness of labor, because home energy and improvement professionals did not have to travel far distances, and it allowed for bulk purchases of energy efficiency equipment. The Near Eastside Neighborhood Sweeps Program contributed to the nearly 1,200 home energy upgrades that were completed through the City of Indianapolis Better Buildings Program as of December 2013, and many homeowners went on to complete additional upgrades with assistance from the EcoHouse loan program.

- **Neighborhood Competitions or Challenges**: Competitions or challenges can help increase program participation by creating a sense of urgency and tapping into people's competitive spirit. Participants should, however, feel like they are winners, and not losers, so they have a positive experience with your program.
    - Connecticut's **Neighbor to Neighbor Energy Challenge** (N2N) used online leader boards to track communities' progress completing upgrades and to spur friendly competition. Connecticut found that the leader board motivated residents to act, and it was often a topic of conversation at town meetings.

N2N Energy Challenge Leaderboard Website



Source: Neighbor to Neighbor Energy Challenge, 2014.

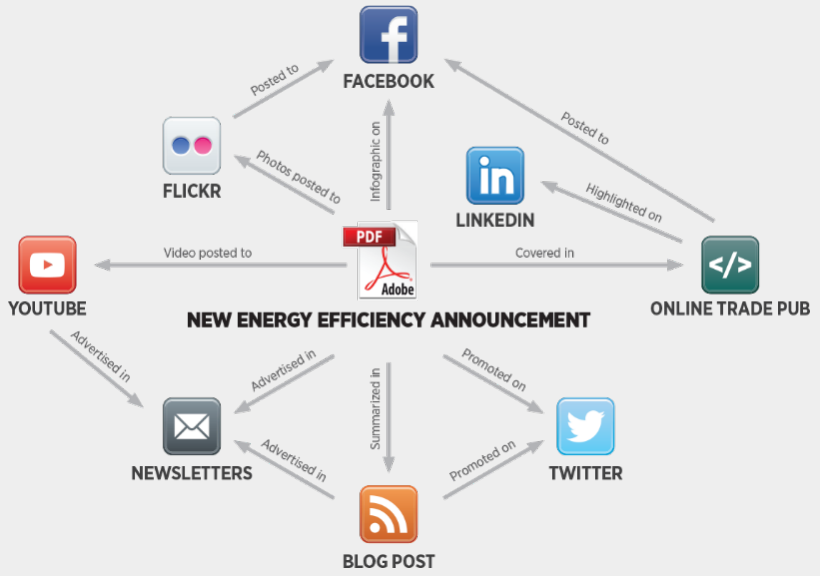
- **Media Outreach**: Using multiple media outreach approaches has proven effective in marketing home energy upgrades. Media can be paid, earned, or social in nature, and each type has a different purpose. The following are examples of media channels you might consider using to increase demand for your program services.
    - **Paid Media**. Paid media, including print, broadcast, Web, and direct mail advertising, can be expensive but allows programs to have control of the message. Eye-catching advertising on billboards, buses, radio, television, and websites has been an effective tool to reach target audiences with awareness messages and incentives.
        - To promote its residential direct install (RDI) program, **Efficiency Maine** combined radio advertising with strategically placed Web banners, print, and movie theater advertising to reach the program's target audience. Demand from the radio ads became so rampant, according to program administrators, that Efficiency Maine was able to halt marketing and continue getting RDI customers through word-of-mouth referrals. Asking customers how they heard about the program in preparation for the program's process evaluation helped Efficiency Maine determine where referrals heard about the program.

    - **Earned Media**. Also known as public relations, earned media can be in the form of print articles, blogs, or television coverage. Earned media offers less message control than advertising, but coming from a third party, it adds much more credibility to your outreach. To earn media attention for your program, your story must be real news and attention-grabbing (i.e., the first, the biggest, the most innovative). Provide facts, visuals, and trained spokespeople to help secure good coverage. Tell stories about satisfied customers and how upgrades benefited them.
        - The **Solar Energy Loan Fund** (SELF) in St. Lucie County, Florida, earned frequent articles in local newspapers with help from an in-house marketing professional who established a significant media and community presence for the program, and by creating opportunities for satisfied customers to tell their stories. My neighbors told me that their utilities were lower than mine so I started looking into making improvements, said one SELF customer. I read about SELF in the newspaper and called that week. They helped me to make a difference and save money.

    - **Social media**. Social media creates interactive, virtual communities that enable two-way communications among people sharing news, photos, videos, music, and other shareable content. Use social networks such as Facebook, Twitter, and Instagram when you are open to two-way communications or to spread the word about program events. Though social media was not an effective tool on its own for Better Buildings Neighborhood Program partners, it did help some programs augment other marketing efforts.
        - The **Michigan Department of Regulatory Affairs** (formerly the State of Michigan's Department of Energy, Labor and Economic Growth) embraced various social media (e.g., Facebook, Twitter, YouTube) and in just two years built a following of 4,000 constituents that post inquiries and talk about the program to others.

Engage Your Audience Through Social Media

The Better Buildings Residential Network's **Social Media Toolkit** describes how to engage potential and existing customers through social media. Social media can build awareness of home energy upgrades and the entities working on them, which can lead to more upgrade projects taking place in the long run. Social media outreach efforts should always be part of an integrated strategy, one in which you share program messages or limited-time offers in audience-appropriate formats across a variety of channels.



Source: Social Media Toolkit, U.S. Department of Energy, 2015

For more ideas and examples of strategies and tactics that have worked for programs, explore the **Tips for Success** and **Examples** tabs in this handbook.

Define marketing and outreach staff needs, roles, and responsibilities

As part of your planning process, you will need to determine staffing needs and define roles and responsibilities for all staff, partners, volunteers, consultants, and even contractors responsible for marketing program offerings. To decide what roles need to be filled, you can start by assigning staff with specific skill sets to handle marketing efforts that fall within those skill sets (e.g., graphics, media outreach, home demonstration events, or social media).

When **identifying partners**, you might have identified some gaps (e.g., number of staff, skill sets) that exist within your marketing and outreach staff. Now is the time to determine whether or not you can fill those gaps with volunteers or staff from partner organizations, or if you will need to hire marketing experts or use marketing consultants. Many programs work with partner organizations, volunteers, and outside vendors to provide marketing and outreach staffing support. If you do bring in outside contractors, make sure they know your program's messages, and for those that support a helpline or provide energy advisor support for customers, make sure they provide good customer service. Your marketing and outreach plan can help provide the basis for the scope of work that might be included in your marketing and outreach request for proposals.

Once staff roles are defined, you will likely need to designate one manager who can coordinate all of the marketing tactics in your marketing and outreach plan. This person should have the authority to make day-to-day decisions about your program's marketing activities, as well as the ability to call on key decision-makers when their input is necessary.

Planning regular check-in meetings that involve the marketing and outreach manager and marketing staff will help ensure consistency among efforts and allow for the steady communication of progress.

Support Beyond Staff

The **Denver Energy Challenge** increased program uptake and conversion rates when it changed its strategy from door-to-door outreach to an **energy advisor model**, which provides hands-on assistance to consumers throughout the upgrade process. The program contracted with local non-profit organizations and businesses to provide and train the energy advisors, so program staff could focus on other efforts.

Denver Energy Challenge found that conversion rates and customer satisfaction ratings were higher among its energy advisors that were more skilled at customer service than they were at building sciences. Learn more about energy advisors in the **Program Design Make Design Decisions handbook**.

Source: **Focus Series: Energy Advisor Program Helps Homeowners Go the Extra Mile in Mile-High City**, U.S. Department of Energy, 2014.

Create a marketing and outreach workplan

Creating a marketing workplan will help you keep track of your program implementation. A workplan outlines what you are going to do, when you are going to do it, and who will be responsible for the planned activities. The workplan should include at least a timeline and estimates for staffing needs and resources. Consider including information about your target audience, your program objectives, and program goals to make sure that each strategy and tactic is mapping back to this information.

Ideas for a Successful Marketing and Outreach Plan

Some ideas for developing a successful marketing and outreach plan include:

- **Select strategies and tactics that align with your goals and objectives**. If your marketing goal is to increase awareness, a broad marketing campaign is fine, but if it is to reach specific audiences where they live and spur action, one-on-one outreach will be key.
- **Work with others**. Which respected community or partner organizations can tell your story most credibly with your target audience? Enlist their help!
- **Do your homework**. Look at what similar programs and partners have done in your area in the past, and research what worked and what did not in the media, with primary audiences, etc.
- **Trust research over personal opinion**. It is tempting to assume that the marketing tactics that influence you personally will also resonate with your target audience. Remember: You are not the target audience, you are the program expert!
- **Communicate the a-ha**. What is new and different about what you are offering, and why will your target audience care?
- **Groom your spokespeople**. Who is the best person to carry your message to the target audience? It might not be you, but make sure he or she is trained in your messages.
- **Execution is king**. The devil is in the details. Plan for events, campaigns, and outreach thoroughly, and practice dry runs where necessary.

- **Foster relationships**. Your partners are a major conduit to your key audiences. You can also treat the local media as partners where possible.

Source: **How to Work With the Media webinar**, U.S. Department of Energy, 2011.

When deciding on timing for your marketing activities, consider how your target audiences' needs and actions change throughout the year. For example, you might want to undertake a special offer at a time when customers have received tax returns but avoid launching initiatives during the holiday season in late November or December, when homeowner spending may be focused elsewhere. Here are examples of programs that have carefully timed the launch of major marketing efforts:

- **Austin Energy** purposefully scheduled its **Best Offer Ever promotion** during the fall and winter, which is typically a slow season for building contractors in otherwise sunny and hot Texas, increasing the likelihood of jobs being completed in a timely manner and helping contractors avoid seasonal layoffs. Austin Energy coordinated this promotion with its contractors, who were interested in having a more normalized workload throughout the year. Note that some contractors prefer to have slow seasons.
- **EnergyWorks** in Philadelphia, Pennsylvania, developed a phased marketing campaign that appealed to Philadelphia homeowners based on the current weather conditions. On hot days, for example, visitors to sites where EnergyWorks advertised would be greeted by an animated banner enticing them with words such as "ice cream" and "central air." When potential customers clicked on EnergyWorks' advertisements, they were taken directly to the program's website, which provided clear, easy to understand calls to action.

EnergyWorks Phased Marketing Campaign

Source: **Energy Efficiency Residential Marketing Keep it Simple. Keep it Focused**, EnergyWorks, 2012.

U.S. Department of Energy Implementation/Workplan Resources

- The **Marketing & Outreach Implementation Plan Template** will help you develop a strategy for planning, operating, and evaluating your marketing and outreach activities.
- You can use the **Better Buildings Neighborhood Program Workplan/Timeline worksheet**, developed by the U.S. Department of Energy, to help organize your marketing and outreach workplan.

Establish a marketing budget

Developing a marketing and outreach budget is an important step in your marketing and outreach plan. Note that your marketing budget will be a fraction of your **overall program budget**, so be sure to coordinate with the appropriate staff about budget needs and to be clear on the amount that is allocated for marketing and outreach.

When developing a budget for marketing and outreach activities, estimate the costs as close as possible so that you have sufficient resources to devote to each strategy and tactic you want to employ. Putting more resources into a select number of tactics and implementing them well can be more effective than spreading your budget too thin across several tactics that you do not have the time or resources to fully support. Whatever budget you decide on, make sure that it lines up with your overall **program business plan and budget**.

Do not be afraid to **realign the marketing budget** as you evaluate how different strategies are working to achieve your goals and objectives. For example, if a home demonstration strategy is yielding a solid number of assessment and upgrades, and few calls or website traffic are resulting from your bus advertisements, reconsider your bus campaign; the money might be better spent on home demonstration events.

Communicate your plan with stakeholders

Once you have a draft marketing and outreach plan, share your strategies and tactics with partners and other stakeholders. Partners can help determine if your tactics will reach their constituents and whether your marketing approach will resonate with priority audiences. They might also be willing to provide staff to support your program's one-on-outreach efforts, access to their media outreach channels (e.g., website space), and free marketing as part of their own communications activities.

Most programs agree that involving contractors early in the program design process is important to a program's success, since they are often the ones selling the services and incentives your program has to offer to customers.

- **Austin Energy** in Texas made a point of involving contractors early on when it developed its "**Best Offer Ever**" campaign, a combination of rebates and financing, to both educate them on the offer and ensure that they were prepared to handle the influx of new customers.

?**Spotlight on Austin, Texas**

Better Buildings
NEIGHBORHOOD PROGRAM
U.S. DEPARTMENT OF ENERGY

Spotlight on Austin, Texas:

Best Offer Ever Produces Upgrades in Record Time

Key Takeaways

- Use valuable, short-term promotion to jump-start program interest
- Build on existing energy efficiency efforts to launch quickly and learn for the next iteration
- Plan for contingencies and resolve your errors

"Getting on the landscape fast with some successes built positive momentum. There will be warts, so set reasonable expectations... but it is a great way to let people know you are on the scene."

—Karl Rábago, Vice President, Austin Energy

The Better Buildings Neighborhood Program is part of the national Better Buildings Initiative led by the U.S. Department of Energy.

To learn how the Better Buildings Neighborhood Program is making homes more comfortable and businesses more lucrative and to read more from this Spotlight series, visit betterbuildings.energy.gov/neighborhoods.

Launch With a Short-Term Promotional Offer to Jump-Start Participation

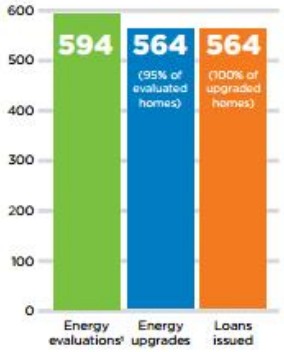
With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months—more than 10 times the utility's typical participation rate. To quickly develop momentum for Better Buildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR® infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy evaluations, inspections, improvements, and loan origination, while learning valuable lessons along the way.

The Best Offer Ever

Austin Energy's high-value promotion—the Best Offer Ever—presented customers who signed up for an energy upgrade between October 1 and December 31, 2010, with a significant financial incentive, resulting in 564 Home Performance with ENERGY STAR upgrades in six months. In the past, participants in Austin Energy's Home Performance with ENERGY STAR program received a free energy evaluation,[1] but had to choose between a rebate or low-interest rate financing through a local credit union to complete the recommended upgrades.[2] By signing up during the promotion, participants could receive both the rebate and financing, for a combined value of approximately $2,300 per household. Even with the sizable incentive, Austin Energy leveraged $4.39 million in loans using $700,000 of its Better Buildings seed funding to pay for the incentives and marketing to launch the promotion.

Figure 1. Best Offer Ever Promotion Results

Data reflect energy upgrades completed between October 1, 2010, and March 31, 2011, under the Best Offer Ever. The Best Offer Ever was only available to homeowners who signed up between October 1 and December 31, 2010.



1 Most contractors perform a free visual assessment (without blower door or infrared testing).

2 Austin Energy rebates of up to $1,800 are based on depth of energy savings. Interest rates range from 0 to 8 percent for three- to 10-year loans depending on loan length, measures installed, and customer credit history. Program participants may also be eligible for up to a $500 Texas Gas Service Rebate (typically averaging around $300) and a $500 or $1,500 federal tax credit, depending on when the work was completed.

Source: **Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time**, U.S. Department of Energy, 2011.

Tips for Success

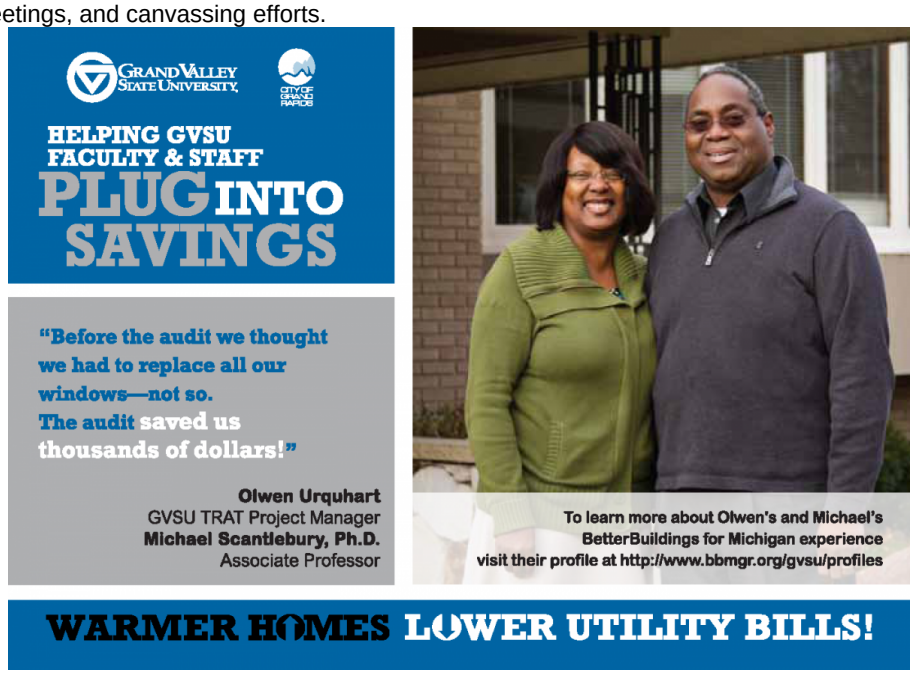
In recent years, hundreds of communities have been working to promote home energy upgrades through programs such as the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and others. The following tips present the top lessons these programs want to share related to this handbook. This list is not exhaustive.

Foster "word of mouth" communication from satisfied customers

Programs found that encouraging word of mouth outreach by asking satisfied customers to promote their program experience to peers helped attract more homeowners who completed energy upgrades. Referrals from neighbors and friends who are happy with their energy improvements can provide a good source of leads. Marketing materials can feature homeowner testimonials about real benefits to build community trust in the program and enhance energy efficiency awareness efforts.

The research paper, **Environmental Sustainability and Behavioral Science: Meta-Analysis of Proenvironmental Behavior Experiments**, analyzed the most effective methods for encouraging environmentally sustainable behaviors. The authors define "social modeling" as the passing of information via demonstration or discussion in which the participants indicate that they personally engage in the behavior. This concept can be one of the most effective behavioral tactics for promoting home energy efficiency. Many programs found that homeowners are more likely to participate after hearing neighbors or peers describe their experience and how they benefited.

- As part of its efforts conducting "neighborhood sweeps" to test various outreach strategies in 58 different neighborhoods across the state, **Michigan Saves** regional coordinators learned that preparing neighborhoods for the sweep was essential. To prime neighborhoods for sweeps, the program first worked with **early adopters**, who were trusted, high profile people who could publicly vouch for and perhaps canvas neighborhoods for the program. In some cases, the early adopter was from a neighborhood church, and in others, the community trusted their mayor, local council, or a nonprofit organization. These early adopters helped spread the word about Michigan Saves, formerly BetterBuildings for Michigan, by encouraging colleagues to sign up for the program at community events, meetings, press events, and in printed marketing materials and written testimonials on websites. Brochures and word-of-mouth recommendations doubled and tripled sign-up rates, respectively. Regional coordinators based their marketing plans on using these trusted messengers in letters, case studies, community meetings, and canvassing efforts.



Source: Michigan Saves

- Using social media such as Facebook, the **Milwaukee Energy Efficiency program** (Me^2) promoted "referral rewards" to customers who recruited their friends and family to sign up for the program. Homeowners would enter their friend's contact information into the Refer a Friend section of the Me2 website. In return for providing this lead to the program, the homeowner received one free LED light bulb. If the friend signed up for the program, they would both receive $50.

Make upgrade benefits visible by showcasing completed projects and actual results

Unlike remodeling projects, home energy upgrade benefits are generally not immediately visible to the casual observer. Strategies that demonstrate tangible benefits from upgrades can help increase understanding and motivation with potential customers. To help energy efficiency become real, some programs successfully used house parties and demonstration homes to show potential customers what a home energy assessment or upgrade entails. In some cases, the hosts of these events were interested or satisfied customers who invited friends and neighbors, allowing the program to leverage word-of-mouth marketing from trusted sources. Program staff and a contractor were typically present to walk the attendees through a home energy assessment of the house or, when showing an upgraded home, point out the home performance measures that were installed.

California Puts Homes on Display

Source: California Center for Sustainable Energy

In Their Own Words: Engaging Neighbors Through Home Energy Showcases

Source: U.S. Department of Energy, 2012.

- During a one-year "house party" initiative, **Energy Impact Illinois** worked with trusted neighborhood champions to host more than 650 house parties, which enabled more than 3,000 Chicago homeowners, neighbors, and friends to see for themselves what energy efficiency upgrades can mean to a home. Each gathering included a real-time energy assessment demonstration on the homeowner's home, and the opportunity for attendees to sign up for their own assessment or upgrade. Program administrators estimated that more than 900 house party participants completed upgrades. Learn more in the **Focus Series interview with Energy Impact Illinois**.
- The **California Center for Sustainable Energy**, which manages a residential energy efficiency program in San Diego, partnered with municipalities to conduct **demonstration home tours**, which successfully promoted both energy assessments and the contractors who performed them. During the tours, neighbors heard testimonials from demonstration homeowners, took a firsthand look at contractors' work, asked questions of the contractors who installed the upgrades, learned about available incentives, and had an opportunity to sign up for an energy assessment of their own home. Between January 28 (when the initiative formally launched) and April 21, 2012, about 25% of the home tour participants signed up for a home energy assessment with a contractor.

- **NOLA WISE** (New Orleans, Louisiana, Worthwhile Investments Save Energy) generated its highest number of high-quality leads through its Homeowner Showcases. NOLA WISE organized and promoted the open house events, which were hosted by homeowners who completed home energy upgrades. The NOLA Wise team and contractors were present to highlight the completed home energy upgrades and educate attendees on how to make their own homes more comfortable and energy efficient. The program saw an uptick in home energy assessment requests in neighborhoods where these events were held.

Conduct one-on-one outreach where people gather at their own homes

Programs that conducted one-on-one outreach found that community events provided good opportunities for the program and its partners to connect and build credibility with potential customers. Particularly successful events were ones that attracted the program's target audience and aligned with their program's messaging—such as an Earth Day celebration, home improvement expo, or green fair—because these events had established participants.

Programs found events to be the most successful when the program provided the opportunity for interested homeowners to take action (e.g., sign up for a neighbor-hosted information session, schedule a home energy assessment) right on the spot. Every program found that some events they thought would be great actually deliver fewer leads than expected, so it is important to track the number of leads and program participants that result from each event to determine the effectiveness of participating.

Neighborhood canvasses or "sweeps," were another tactic used by some programs to directly reach potential customers. Sweeps can be time- and labor-intensive undertakings that some programs found to have the greatest impact when targeting specific communities likely to participate in the program. Sweeps were successful for some programs, but not all. A comprehensive **evaluation** of more than 140 programs across the country suggests that programs engage in a concerted priming effort in the target area before canvassing the neighborhood. Learn more about neighborhood sweeps in the **Marketing and Outreach Develop Implementation Plans handbook**.

- **Energize Phoenix** held a community energy efficiency exhibit and contractor fair at the local library to promote its "One Day Only" financial incentives of up to $3,000 per home. Sixteen out of 25 approved contractors participated. More than 500 people attended, 125 homeowners signed up for a home energy assessment on the spot, and the program noted an impressive 58% conversion rate from home energy assessments to home energy upgrades.

Source: Energize Phoenix

- **Sacramento Municipal Utility District's Neighborhood Program**—a Better Buildings Neighborhood Program partner in California—promoted its home energy upgrade program at high school fundraisers, outdoor concerts, homeowner association meetings, parent-teacher association meetings, car shows, and other community events. The program sent direct mail pieces to invite homeowners to attend, speak directly to the participating contractors, and sign up for a free home energy assessment at the event. At some events program staff also had activities for children and prizes or giveaways for homeowners who signed up for their free assessment. The program found that 65% of homeowners who heard about the program did so through these community events.

Provide expertise and newsworthy stories to media outlets to garner earned media coverage

Many successful programs found that getting media attention for their offerings and benefits helped add credibility to marketing efforts and expand their reach. By positioning "green" stories or home improvement mini-segments on local television or radio stations, they provided timely content that generated interest in their programs' services (e.g., a story about how to cool homes in a heat wave).

Although television coverage or advertising may not always generate immediate leads, it can increase program recognition and lay the groundwork for future leads. Successful programs also tracked where customers heard about their program to understand which outlets were working (e.g., by including promotional codes on materials and asking for the code when potential customers call or visit the program's website).

- The media is often interested in stories about the first or the biggest, or about breaking thresholds. The **Greater Cincinnati Energy Alliance** used its 1,000th upgrade milestone as the basis for a press conference, which garnered newspaper and television coverage for the program and its satisfied customers.
- Virginia's **Local Energy Alliance Program** (LEAP) earned media attention for its "house doctor," Guy Caroselli. As an expert on building science and energy efficiency, Mr. Caroselli hosted a weekly radio show, provided home improvement advice at events, and wrote a blog to address recurring issues for contractors and homeowners. Putting a voice with specific expertise in home improvement added a great deal of credibility and human interest to LEAP's outreach efforts.

LEAP's House Doctor Is In

Source: Local Energy Alliance Program

LEAP's "House Doctor" creative approach to providing advice on home energy efficiency garnered media attention for the program.

- The **Solar and Energy Loan Fund** (SELF) in St. Lucie County, Florida, was able to capture media coverage by continuously refreshing its messages and maintaining a tone of "new-ness" to what the program was doing. SELF found that highlighting "first" experiences (e.g., its first Community Reinvestment Act loan, the county's first property assessed clean energy [PACE] program) was key to this approach. As these first experiences are hard to maintain over time, the organization also drew attention to milestones such as its 200th client or hitting a $2 million dollar mark in its lending. Finally, SELF shifted from its own success to highlighting the success of others related to its efficiency program and sharing stories about its customers as well as its affiliated contractors. By stressing that SELF was the local community's nonprofit and that the successes achieved were not only for SELF but for the community as a whole, this engaged the local media over time.

Examples

The following resources are examples from individual residential energy efficiency programs, which include case studies, program presentations and reports, and program materials. The U.S. Department of Energy does not endorse these materials.

Case Studies

Spotlight on Rutland County, Vermont: How Local Ties Lead to Local Wins **(552 KB)**
Author: U.S. Department of Energy
Publication Date: 2011

Building on its understanding of homeowners in Rutland County, Vermont, NeighborWorks of Western Vermont (NWWVT) enlisted respected local citizens and organizations to spread the word about home energy efficiency upgrade opportunities, an effort that helped drive demand for nearly 200 home upgrades in just six months

Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time **(555 KB)**
Author: U.S. Department of Energy
Publication Date: 2011

With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months--more than 10 times the utility's typical participation rate. To quickly develop momentum for BetterBuildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy assessments, inspections, improvements, and loan origination, while learning valuable lessons along the way.

Focus Series: Energy Impact Illinois Learns That Parties Sell Upgrades
Author: U.S. Department of Energy
Publication Date: 2013

This case study discusses Energy Impact Illinois' marketing evolution from a broad outreach campaign to a Òhouse partyÓ approach that brought Chicago homeowners, neighbors, and friends together to learn about energy efficiency opportunities, while increasing demand for home energy assessments and upgrades.

Focus Series: Residential Air Sealing Program Drives Maine Home Energy Savings Through the Roof
Author: U.S. Department of Energy
Publication Date: 2014

This case study discusses Efficiency Maine's successful statewide Residential Direct Install (RDI) program that was established in 2012 to help create demand for home energy assessments and upgrades.

Focus Series: Energy Advisor Program Helps Homeowners Go the Extra Mile in Mile-High City
Author: U.S. Department of Energy
Publication Date: 2014

This case study discusses Denver Energy Challenge's adjustment from focusing on door-to-door outreach to an energy advisor model that allowed customers to receive one on one support throughout the home energy upgrade process.

Spotlight on Michigan: Sweeping the State for Ultimate Success **(500 KB)**
Author: U.S. Department of Energy
Publication Date: 2011

This case study describes an innovative program design used by BetterBuildings for Michigan to "sweep" neighborhoods in order to effectively reach its residential audience and achieve an 80% participation rate among those canvassed.

Program Presentations & Reports

Turning Around Your Residential Program: Lessons Learned - City and County of Denver
Author: Elizabeth Babcock, City and County of Denver, Colorado
Publication Date: 2012
This presentation highlights key plan elements that helped a Denver energy efficiency program reorient toward success.

Program Materials

Energy Upgrade California Marketing and Communications Plan **(2 MB)**
Author: Energy Upgrade California
Publication Date: 2010
This marketing and communications plan from Energy Upgrade California includes a goal to reduce aggregate greenhouse gas emissions through energy and resource-saving upgrades of existing building stock. The plan also outlines several objectives the program developed to help them meet this goal.

Clean Energy Works Oregon (now Enhabit) Marketing Plan **(124 KB)**
Author: Clean Energy Works Oregon (now Enhabit)
Publication Date: 2010
A marketing and communications plan from Clean Energy Works Oregon (now Enhabit) outlines the program's marketing vision and objectives, as well as the strategies the program planned to undertake to meet these goals.

Boulder County (now EnergySmart) Marketing Plan and Implementation Guide **(4 MB)**
Author: The Cadmus Group, Inc.
Publication Date: 2011
This marketing plan and implementation guide includes the marketing goals and objectives for Boulder County, Colorado (now EnergySmart).

Project Implementation Plan: Colorado Retrofit Ramp-Up Project **(275 KB)**
Author: EnergySmart
Publication Date: 2011
Example of an implementation plan developed by EnergySmart Colorado at the beginning of the implementation of its Better Buildings Neighborhood Program.

Toolbox

The following resources are available to help design, implement, and evaluate possible activities related to this handbook. These resources include templates and forms, as well as tools and calculators. The U.S. Department of Energy does not endorse these materials.

Templates & Forms

Better Building Residential Program Implementation Plan Template - Marketing & Outreach **(2 MB)**
Author: U.S. Department of Energy
Publication Date: 2015

The Marketing & Outreach Implementation Plan Template will help you develop a strategy for planning, operating, and evaluating your marketing and outreach activities.

Better Buildings Neighborhood Program Marketing Workplan and Timeline Template
Author: U.S. Department of Energy

A one-page template that helps program administrators visualize activities and associated timelines for their marketing efforts.

Tools & Calculators

Challenge-Needs-Strategies-Resources Table: Marketing & Outreach **(154 KB)**
Author: U.S. Department of Energy

This table identifies several challenges and the strategies and tactics that can be used to overcome them.

Better Buildings Residential Network Social Media Toolkit
Author: U.S. Department of Energy
Publication Date: 2015

The Better Buildings Residential Network Social Media toolkit can be used to help residential energy efficiency programs learn to engage potential customers through social media. Social media can build brand awareness concerning home energy upgrades and the entities working on them, which can lead to more energy upgrade projects taking place in the long run. This toolkit will help program managers and their staff with decisions like what social media works best for various program needs. When aligned with other marketing and outreach efforts, social media can be a useful tool in attracting home energy upgrade customers. Note that social media changes constantly, so users of this toolkit need to regularly reassess their methods and review results to ensure goals are being met.

Topical Resources

The following resources provide additional topical information related to this handbook, which include presentations, publications, and webcasts. Visit **Examples** for materials from and about individual programs.

Topical Presentations

Effective Email Campaigns for Recovery Act Energy Efficiency Programs **(929 KB)**
Author: U.S. Department of Energy
Publication Date: 2011
This presentation provides ideas for the effective use of email communication for programs, including links to additional tools and resources for running a successful campaign.

Social Media Tools & Strategies **(1 MB)**
Author: U.S. Department of Energy
Publication Date: 2011
This presentation provides a list of resources and tips for running a social media campaign.

Marketing and Communications: Marketing & Outreach **(588 KB)**
Author: U.S. Department of Energy
Publication Date: 2010
This presentation discusses elements of developing an energy efficiency program marketing and communications strategy, including concepts to consider in a marketing plan.

Using Social Media to Engage the Community in Energy Efficiency Projects
Author: U.S. Department of Energy
Publication Date: 2011
This webinar presented ways various programs use social media tools to enhance and promote their energy programs among their communities.

Publications

Marketing & Outreach for Home Energy Improvements
Author: Lawrence Berkeley National Laboratory
Publication Date: 2010
This guide provides an assessment of various approaches to Marketing & Outreach for home energy efficiency improvements.

Your Home Performance Marketing Plan
Author: OmStout Consulting, LLC
Publication Date: 2013
This blog post outlines basic needs for a successful marketing program: a plan; a budget; and to launch, track, evaluate, adjust, repeat.

Cambridge Energy Alliance's Residential and Small Business Communications and Marketing Strategy **(663 KB)**
Author: Hattaway Communications
Publication Date: 2007
This marketing strategy includes the goals and objectives the Cambridge (Massachusetts) Energy Alliance set out to meet.

Overview of Marketing Methods for Local Retrofit Programs
Author: Oak Ridge National Laboratory
Publication Date: 2011
This report shares strategies for marketing local energy efficiency programs, particularly through focused messaging, leveraging partnerships, and social media.

Creating an Effective Marketing Plan for Your Home Performance Business
Author: Jacey Johnson for Home Performance Magazine
Publication Date: 2014
This blog provides six tips the home performance communications professionals can use to create a new or update an existing marketing plan.

Webcasts

How to Work with the Media
Presentation **(3 MB)**, **Media**, **Transcript**
Author: U.S. Department of Energy
Publication Date: 2011
This webcast offers a preview of tools and proven techniques to work with local media to increase program visibility. The webcast also features a discussion where participants shared what is working with their program's media efforts.

Marketing, Communication, and Outreach: Lessons Learned In and Outside Energy Efficiency
Presentation, **Media** **(105 MB)**, **Transcript**
Author: U.S. Department of Energy; Lawrence Berkeley National Laboratory; Booz Allen Hamilton, Inc.; Clean Energy Solutions, Inc.; Local Energy Alliance Program
Publication Date: 2010
This webcast presents lessons learned in marketing, communication, and outreach, including lessons related to marketing plans.